

How to Amend Contacts and User Details – Supplier Side

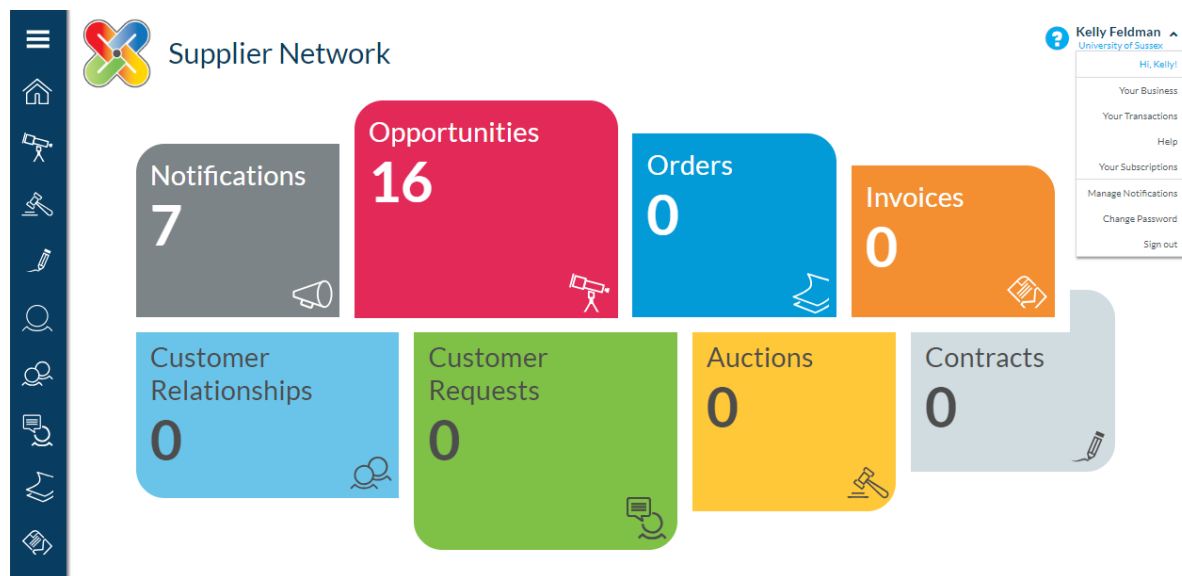
Identify who your users are and ask them to follow this link to the Proactis system:

<https://www.proactisplaza.com/>

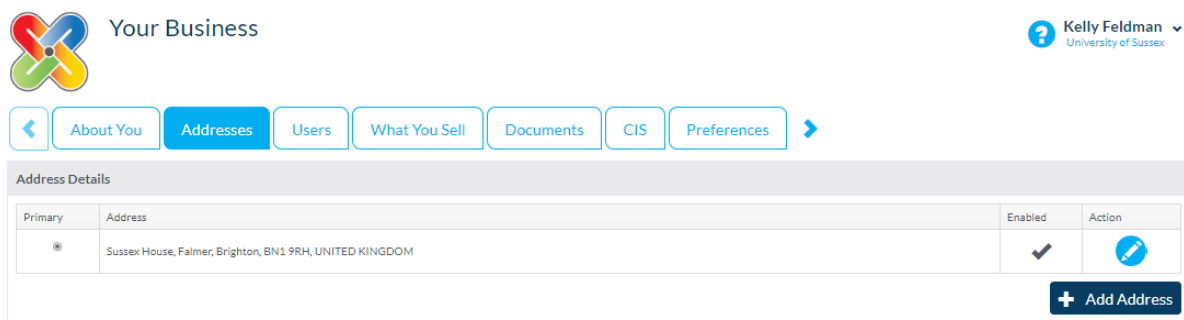
NB: your users can add others users for your organisation if required. If you need assistance in finding your users or with any aspect of the Proactis platform you can contact suppliers@sussex.ac.uk or the Proactis team on suppliersupport@proactis.com.

If your user cannot remember the password set (USERNAME is usually the email address) you can use the reset password function on the home page at the link above.

Once you have accessed the portal you can update your contacts by clicking on the icon in the top right of the “Supplier network” window and following the drop down to “YOUR BUSINESS”:



Navigate to “ADDRESSES”



Primary	Address	Enabled	Action
Ⓜ	Sussex House, Falmer, Brighton, BN1 9RH, UNITED KINGDOM	✓	

[+ Add Address](#)

Here you can see the address for your organisation.

If you have multiple users and their email addresses are the ones you wish to attribute to the categories below are already users you can follow the instructions below to ADD EXISTING USERS AS CONTACTS.

If you need to add more users please follow instructions below for ADDING NEW USERS.

Address Categories

“ORDERING” – which is where you want the emails from University of Sussex to be sent for orders to be received.

“PAYMENT” – this is where remittances and financial information would be sent.

These are the two key categories we require to be correct that link closely with our Finance system.

There are also INVOICING, DELIVERY and ESOURCING categories. You will need to select the correct information for these categories.

Add Existing Users as Contacts

Navigate to “Addresses”, click on the pencil (EDIT) icon.

Navigate to “Address Types”

Address Type	Address To
<input checked="" type="checkbox"/> Ordering address	UAT PROACTIS Admin
<input checked="" type="checkbox"/> Payment address	UAT PROACTIS Admin
<input checked="" type="checkbox"/> Invoicing address	UAT PROACTIS Admin
<input checked="" type="checkbox"/> Delivery address	UAT PROACTIS Admin
<input checked="" type="checkbox"/> e-Sourcing address	UAT PROACTIS Admin

You can select the appropriate user for each category by using the drop downs. For example you may have added your orders@company.co.uk email as a user and you could select that user from the drop down next to the category of “Ordering Address”. Tick “OK”.

Adding New Users

Navigate to “USERS”

Username	Full Name	Email Address	General Contact	e-Procurement Contact	Sales Contact	Payment Contact	Action
k.feldmanUAT@sussex.ac.uk	Kelly Feldman	k.feldman@sussex.ac.uk	X	X	X	X	

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You can Edit (pencil icon) or Delete (cross icon) users and it is your responsibility to give access to records as per your own organisations policies – please bear in mind bank details are visible and editable if during the process you give the “Administrator” access.

To ADD a new user use the “add user” button

The screenshot shows a dialog box titled "Add/Amend User" with two tabs: "User Details" (selected) and "Contact Type". The "User Details" tab contains the following fields and options:

- Email Address ***: Text input field.
- Telephone Number ***: Text input field.
- First Name ***: Text input field.
- Mobile Number**: Text input field.
- Surname ***: Text input field.
- Fax Number**: Text input field.
- User is an Administrator** ⓘ
- Username same as Email address**
- Address**: Dropdown menu with the value "Sussex House, Falmer, Brighton, BN1 9RH,..."
- Language**: Dropdown menu with the value "English (United Kingdom)"

At the bottom right of the dialog box are two buttons: "OK" (with a checkmark icon) and "Cancel" (with a cross icon).

Complete the details required (make administrator if you deem it appropriate) in the USER DETAILS window. Then choose the category appropriate for the User in the “contact Type” window. To check your categories are correct check your contacts and add any to the correct categories by Navigating to “Addresses” and following the instructions above (ADD EXISTING USERS AS CONTACTS).